

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
October 10, 2023

Trusts & Estates News

This week's Trust and Estate article is:
"Tips for Handling IRS Estate and Gift
Tax Audits"

(Excerpt from actual article):

A respectful and honest approach may be
your best bet..

You can read the article by clicking

[HERE](#).

Last week's Trust & Estate article was:
"Uncertain Times Call for Creative
Estate Planning Strategies"

You can read last week's eNewsletter by
clicking [HERE](#).



Helpful Hint

This week's "Helpful Hint" is:
"Helping a client through the audit
process"

Earlier this month, one of our clients
contacted us as they were working
through an audit process. We supported
them by providing the nuances behind
the financial data we provided as well as
the applicable IRS regulations applied to
the valuations. Ultimately, the audit agent
praised our client for their due diligence
and accepted the valuations.

Our clients can count on us being there if
questions arise about our valuations,
which we stand behind.

Last week's "Helpful Hint" was:
"Including CASH, and other user
defined assets, in webappraise"

You can read last week's eNewsletter by
clicking [HERE](#).



If you want to speak with us, please:
call: 201-784-8500 x107
email: techsupport@appraisenj.net

Financial Market News

This week's Financial Market News is :
"Brace for 5% Yields After Long
Bonds Melt Down"

The Weekly Fix

from **Bloomberg**Markets

Excerpt (from actual article):

Anyone looking for Treasuries to bounce back after September's savage selloff has been severely disappointed. The combination of hawkish comments from Federal Reserve officials and a patina of strong, but second-tier data points, saw October begin with investors rushing for the exits. Yields spiked yet again, with the 30-year touching 5% for the first time since 2007 and traders bracing for the 10-year to reach that level within weeks.

You can read the article by clicking [HERE](#).

Last week's Financial Market News was: "Likely US Shutdown is Awkward For Everyone"

You can read last week's eNewsletter by clicking [HERE](#).

Upcoming Events

(Subject to change - please monitor regularly)

- Wed, Oct 11: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- Fri, Oct 13: (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.



Maybe there is a better way?

Why don't you consider us for your stock and bond valuations for trusts & estates?

Maybe there is a better way than how you are doing them now? We've been providing these valuations since 1985 and have experience and insight.

Keep reading for a list of valuations we provide and how you can get them.



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Which valuations can I get from ESI-APPRAISE?

We give you access to all the tools, information, and professional support you need to increase your profits and serve your customers better. Additionally, ESI-Appraise offers a broad range of global securities and related financial data from all major markets and exchanges.

- IRS Form 706 Estate Tax Date of Date & Alternate Valuation Date
 - IRS Form 709 Gift Tax
 - IRS Form 8971 Beneficiaries
 - IRS Form 1040/1041 Income Proration for Calendar or Fiscal Year
 - Distributions
 - Charitable Remainder Unitrusts
 - Grantor Retained Annuity Trusts
 - Capital Changes
 - Cost Basis Calculator for Corporate Actions
 - Cost Basis Calculator for Dividend Reinvestment Plans
-

How can I get a valuation from ESI-APPRAISE?

1. Secure online solutions (You do the work to save money.):

- **APPRAISE.Cloud:** web product which can be run from anywhere
- **APPRAISE.Windows:** software and data stored on your computer
- **APPRAISE.SaaS:** our Software as a Service (SaaS) solution. SaaS means we host the software, which you access via the internet, and you store your data locally on your computer. This benefits you and your information technology group because a hybrid solution takes the best of software and cloud and combines them. You're always running the current version and do not need to install updates. Your portfolio data is stored securely on your computers. It's easy to add and remove users.
- **ESI-Direct:** ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the 706, reducing steps, saving time, and increasing accuracy.
- **Universal Import:** A utility which enables users to create portfolios from comma delimited or Excel files in lieu of manually entering CUSIP/Ticker and shares. This works very well with exports from trust systems.

2. Outsourcing solution (We do the work and save you time.):

Valuations can be submitted/delivered via email, fax, overnight courier, or mail.

Click [HERE](#) for an order form.

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Thank you for subscribing and allowing us to serve you.

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